

## **TERMS OF REFERENCE FOR CONSULTANTS**

### **Social Protection Specialist and Team Leader**

**Source:** International

**Duration:** 4 person-months, intermittent

#### *Objective and Purpose of the Assignment*

ADB's developing member countries (DMCs) have recognized social protection as one of the key priorities to achieve growth with equity. A number of governments have already started designing and reforming their social protection system. However, coverage provided by social insurance very often remains limited to formal employment, hence innovative measures to tackle the need to cover or protect vulnerable population are still needed.

One of the key challenges to expand social protection in DMCs, particularly in low and middle income countries, is adequate financing. Recent expenditure data of the ADB Social Protection Indicator have shown that DMCs spent on average less than 3.6% of gross domestic product (GDP) for social protection programs, which include contributory, non-contributory social protection and active labor market programs.<sup>1</sup> Initial estimates in a parallel study being supported by ADB on financing social protection also reveals the huge financing gaps on social protection to meet the SDGs in Asia. In order to meet the basic minimum of social protection floor, DMCs have to increase their budget requirement on average of 5% GDP for low income countries and about 2% GDP for middle income countries to meet the SDGs target.

Financing constraints in DMCs is compounded by the low quality of demonstrated capacity to design and implement social protection programs. Three factors contribute to this: (i) lack of financial analysis of the current social protection programs, (ii) lack of strategic framework to finance sustainable social protection programs, and (iii) lack of training programs on planning and monitoring public spending on social protection programs.

This engagement will help address the financing constraints for social protection programs in DMCs by supporting DMCs deal with these factors.

#### *Scope of Work*

The Social Protection Specialist and Team Leader is expected to provide overall supervision, coordination and technical guidance to the team of international and national consultants who are responsible for preparing the comprehensive financial assessment on expenditure of social protection programs related to SDGs targets, undertaking fiscal space analysis and developing the strategic framework in 3 DMCs and preparation of country and regional reports. The specialist/team leader is also expected to ensure that the gender dimension is considered in all TA outputs and activities.

#### *Detailed Tasks and/or Expected Output*

The work will involve but will not be limited to the following tasks:

- prepare a short methodological and guidance note for the team of international and national consultants on how to proceed with the assessment and data collection on financing

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<sup>1</sup> Recalculated based on Table 2.1 of ADB. 2016. *The Social Protection Indicator: Assessing Results for Asia*. Manila (an output of ADB. 2014. *Technical Assistance for Assessing and Monitoring Social Protection Programs in Asia and the Pacific*. Manila).

selected priorities of social protection programs, including conduct cost-benefit analysis on the proposed priorities;

- contribute as a resource person during inception and final technical workshops for capacity building and information dissemination in DMCs;
- review the country reports, suggest ways to improve them, and consolidate the country-level findings to come up with policy and program recommendations;
- in collaboration with the international and national consultants, prepare the regional report on financing and fiscal space for expanding social protection programs, fiscal space and strategic framework; and prepare ADB brief (maximum 8 pages) on the summary of regional findings;
- contribute to and support the information dissemination activities of ADB's social protection team in ADB's Sustainable Development and Climate Change (SDCC) Department and the technical capacity-building activities under the TA; and
- undertake other tasks necessary in relation to the implementation of the study.

#### *Minimum Qualifications*

The Social Protection Specialist and Team Leader should be an expert on international development, particularly as it relates to social protection financing. This expert should have considerable country experience in social protection programs in Asia and the Pacific, with at least 10 years' experience in social protection research or administration. Written articles and reports published in refereed journals and publications on social protection issues will be an advantage.

#### *Deliverables*

- methodological and guidance note for the team of international and national consultants
- policy and program recommendations from the country reports
- regional report on financing and fiscal space for expanding social protection programs, fiscal space and strategic framework
- manuscript for ADB Briefs (maximum 8 pages, following the ADB template) on the summary of regional findings

## **Social Protection Specialists/ Actuarial Specialists**

**Source:** International

**Duration:** 6 person-months, intermittent (3 specialists)

### *Objective and Purpose of the Assignment*

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Financing constraints in DMCs is compounded by the low quality of demonstrated capacity to design and implement social protection programs. Three factors contribute to this: (i) lack of financial analysis of the current social protection programs, (ii) lack of strategic framework to finance sustainable social protection programs, and (iii) lack of training programs on planning and monitoring public spending on social protection programs.

This engagement will help address the financing constraints for social protection programs in DMCs by supporting DMCs deal with these factors.

### *Scope of Work*

The Social Protection/Actuarial Specialists are expected to support the country assessments and capacity building activities (1 specialist per country, 2 months each).

### *Detailed Tasks and/or Expected Output*

The work will involve but will not be limited to the following tasks:

- analyze current government budget allocations for social protection programs (with reference to the SDGs);
- develop detailed analysis on expected fiscal requirements for the implementation of national policies to meet the targets of the SDGs and provide initial considerations on the fiscal space to be opened up to finance the closure of the observed social protection gaps;
- identify possible financing options to introduce and/or scale up social protection systems and provide a detailed description of the distinct risks and trade-offs that are associated with each of the options. The uniqueness of each country requires that fiscal space options be carefully examined at the national level and alternatives fully explored in consultation with relevant government agencies;

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- conduct training for government agencies responsible for planning, implementation and monitoring social protection policies and programs; and
- prepare a country report, strategy framework for financing, and policy briefs on the requirement for financing and fiscal space for social protection programs to achieve SDG targets and the implementation of training programs/capacity building for government agencies responsible in designing, implementing, and monitoring of social protection programs and policies.

#### *Minimum Qualifications*

The expert will have a graduate degree in statistics, math, or actuarial science, or in other quantitative fields such as business or finance, with at least 7 years' experience in social protection research or administration. This expert should have considerable country experience in social protection programs in the specific country that will be assigned to him/her.

#### *Deliverables*

- country report
- strategy framework for financing
- policy briefs on the requirement for financing and fiscal space for social protection programs

## **Social Protection Officers**

**Source:** National (tentatively one each from INO, MYA, and TIM)

**Duration:** 12 person-months total, intermittent, 3 specialists

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### *Scope of Work*

The national social protection officers are expected to support the international consultants in preparing the country assessments for the estimation of financing the social protection programs and capacity development of government agencies responsible for designing, implementing and monitoring social protection policies and programs.

### *Detailed Tasks and/or Expected Output*

The work will involve but will not be limited to the following tasks:

- collect and update data on social protection programs, expenditures, beneficiaries, and the related country data needed for preparing the financing and fiscal space analysis;
- liaise with the focal point personnel in government ministries and visit relevant institutions and stakeholders to collect data and information on social protection arrangements, legislation, and institutions;
- organize training and national workshop with stakeholders. This will include a discussion on the preliminary findings of the country assessment and the development of the fiscal space and strategic framework;

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<sup>3</sup> Recalculated based on Table 2.1 of ADB. 2016. *The Social Protection Indicator: Assessing Results for Asia*. Manila (an output of ADB. 2014. *Technical Assistance for Assessing and Monitoring Social Protection Programs in Asia and the Pacific*. Manila).

- coordinate with the international consultants in charge of combining and monitoring the results of the country studies and will integrate comments and follow guidance provided; and
- participate in regional technical-capacity-building workshops, as requested.

#### *Minimum Qualifications*

The expert will have a university degree in sociology, economics, statistics, or related area. The specialist will have at least 5 years' experience in research and/or administration in social protection.

#### *Deliverables*

- data on social protection programs, expenditures, beneficiaries, and the related country data needed for preparing the financing and fiscal space analysis;
- country report

## **National Research Coordinators/Workshop Coordinators**

**Source:** National (PHI)

**Duration:** 6 person-months, intermittent, various

### *Objective and Purpose of the Assignment*

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### *Scope of Work*

The coordinator will work with the TA team to organize the knowledge-sharing events as part of the capacity-building and information-dissemination activities of the TA and prepare information dissemination materials, including publications and web-content inputs. The coordinator will report directly to the principal social development specialist and social development officer (social protection) from ADB's Sustainable Development and Climate Change Department, and will provide regular updates on the status of the activities.

### *Detailed Tasks and/or Expected Output*

The work will involve but will not be limited to the following tasks:

- coordinate with and monitor national and international consultants in the conduct and submission of country and regional studies;
- provide technical and coordination support for TA implementation, including research inputs as needed;
- provide technical and coordination assistance to the team leader and international consultants for preparing the report and arranging capacity building at national and regional levels;

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- coordinate all logistical arrangements for each workshop, including sending invitations, requesting nominations, scouting for venues, making hotel and air ticket arrangements, and finalizing programs and tool kits;
- support the coordination of all media and dissemination activities related to the events;
- carry-out other post-workshop tasks, such as uploading presentations to related websites;
- assist the development of knowledge products and knowledge dissemination; and
- perform other tasks required for knowledge management and sharing activities.

#### *Minimum Qualifications*

The consultant should have a university degree in economics, statistics, or a related area, and at least 6 years of experience in research or administration in social sectors.

#### *Deliverables*

- Progress reports on TA implementation (frequency to be determined with the TA supervising unit specialist)